

STATEWIDE CLIENT INDEX USER GROUP MEETING SEPTEMBER 18, 2002 MINUTES

ATTENDEES:

Adge, Jeff	CDSS-ISD
Alcalde, Melissa	DSS-APB
Alexander, Ilonka	HF-EDS
Avevalo, Benita	HF-EDS
Ba, Ho Le	CalWIN
Bogovich, Ann	IHSS-EDS
Bornstein, Marty	DHS ITSD
Brill, Roger	DHS ITSD
Capetillo, Sandra	DHS ITSD
Chandhary, Pawan	CALWIN
Cisneros, Shirlee	DHS ITSD
Clendenin, Cindy	LEADER
Comstock, Dave	CDSS-Fraud
Drake, Stacy	HF-EDS
Glaude, Reggie	C-IV
Karen, Tony	IHSS-EDS
McDaniel, Mike	DHS ITSD
McCarley, Traci	DHS CMS
Moth, Eddie	Santa Clara County
Pierce, Rick	Stanislaus County
Preece, Mary	Ventura County
Riojas, Donna	DHS CMS
Sakaue, Dave	HHSDC-SFIS
Scarbrough, Tamara	HF-EDS
Schrag, Michael	HHSDC-SFIS
Vellanoweth, Angelica	HHSDC-SFIS
Wang, Jina	DHS ITSD

Purpose of the meeting

The purpose of this meeting was to discuss the potential system changes to the Statewide Client Index (SCI) application that will make SCI more useful and provide more accurate data to our customers.

Load AKA Names

SCI was started January 1, 1994. The original AKA Name interface from MEDS started with records created with implementation and forward. In an effort to improve the accuracy of record matches it was identified that all MEDS AKA names records built prior to 01-94 should be added to SCI.

Dual Search

End users, particularly the Healthy Families Program, have asked ITSD to enhance the search capabilities of SCI so that a single query will gather both potential matches by SSN and by name. Before this change, when a match was found on SSN, the program stopped looking for other matches, and returned the records that match the input SSN. DHS established a new search type ('D' for Dual) to allow users to take advantage of this enhanced feature.

ITSD implemented this change with the following constraints:

- a) Un-duplicate the pick list so that we only return one entry per CIN.
- b) A total of 25 entries can be returned.
- c) Since HFP comes in through the CATS door, we will need to develop a new transaction (0101), which will always be a dual search.

This was installed April 2002 MOE.

Feedback From The Group

Suggestions were made to have D (dual search) be a default key since this would bring back more records at once. Also it would be less work.

Currently if more than 25 entries returned a message is not displayed alerting the user that more possible entries exist. In order to have an alert the County SCI Sub-systems would have to make changes on how it interprets the return code. Counties are to think about the pros and cons of making the changes.

Application Tracking

This project was initiated due to the Healthy Families (HF) Parent Expansion project. Effective July 1, 2002, MEDS will track applications received from County Welfare Departments (CWD) and Healthy Families/Single Point of Entry (SPE). Federal terms and conditions require the State to report quarterly and annually on areas relating to the demonstrated success of the program's goal to increase the number of children being covered by health insurance.

INQN-Statewide Inquiry For File Clearance

The Statewide Inquiry for File Clearance screen provides access to information maintained on the MEDS name cross-reference file as well as the Statewide Client Index (SCI) database. The SCI database serves as a hub for several programs, including MEDS, and is a useful tool in identifying clients. The SCI name searches are different from the traditional MEDS name search in that they use a phonetic key whereas MEDS requires an exact name match. The Address Search uses the Address to obtain the ZIPCODE Plus+4, which locates those clients with the same Zip code.

A client may be identified by the following five methods: MEDS Name, SCI Fuzzy Name, SCI Scored Name, Address Search, and Client ID Search. The three Name Search will allow users to identify a recipient when MEDS-ID or a previous used County-ID is not available. The Client ID Search will allow users to identify a recipient by known MEDS-ID, SSN, or CIN. The Address search will allow users to identify a recipient by known address. This will be installed November 2002 MOE.

The Mother's Name is a future use search element.

Feedback From The Group

Recommendations were made to use SCI timestamp to determine the most current address and to sort the address by current, prior and mailing on the SCI Address Search screen.

Future Enhancements

SCI Record Combine

The group has recommended that DHS develop a way that SCI users can combine records on SCI. This item has become more critical to those counties in the process of converting to the new CalWIN system. The CalWIN system will contain the CIN number and it is critical that a data review take place prior to conversion. One of the items that is required for a clean conversion is the ability to unduplicate records.

The counties have asked that a transaction be developed that would allow the counties to perform an SCI combine. There were several issues identified that needed further discussion. It was decided that a separate work group will convene to discuss the relevant issues and make recommendations on how best to precede.

Mike McDaniel will set up the meeting.

SCI Record Link

Generate a message updating a similar linked person by name and birth date. Only ITSD can link SCI records. ITSD will provide specific functions so the Users group can discuss. This item will also be discussed at the above separate meeting.

SCI Record Delete

SCI is a mirror of the customer's database. Given that, the SCI database should always be in sync with the customer's database. When customers delete records from their database, they also need to delete them from SCI. The Delete/Unlink program allows users to manually delete/unlink records from SCI enabling them to maintain synchronicity between their database and SCI.

When records are known by more than one system, i.e. SAWS, MEDS, CATS, HF, CCS, SAXX, the record is unlinked instead of deleted. Under this condition, the "KNOWN TO" flag, for the system performing the delete/unlink, is removed from SCI, thus keeping the record intact. In addition, data specifically known in an ALT table by the application performing the delete/unlink is removed from that ALT table. The most current name, SSN, birth date, and county code are migrated to the CIN_MAIN table based upon the timestamp.

DHS will develop an SCI instruction manual outlines procedures customers must follow to manually delete/unlink a record from SCI when the record is known to SCI by the customer's application. Deleted production records are placed into a history file. This allows for an audit trail in addition to the recovery of a record that may have been deleted in error.

This item will also be part of the discussion of the above separate meeting on SCI record combining.

Feedback From The Group

Need to identify which individuals will have authority to perform delete transactions.

Add SSN Verification Code to SCI

DHS has raised the priority of adding the MEDS SSN Verification code to SCI. Work will start soon to add this data to appropriate SCI tables. Edits will be included which would not allow updates to certain fields if the record has been validated.

EXCITE Region

DHS has developed a separate test region that can be used by its customers needing to test with ITSD. IT has the advantage that it's environment can be set up separate from the main DHS MEDS test environment which is tied to change cycle installs. It has been set up to include most of the ITSD test regions. It is currently being set up to perform CalWIN and CMIPS interface testing.

ITSD would like to have a contact person to notify users when the region is going down. Send the e-mail address to Mike McDaniel mmcdanie@dhs.ca.gov.

This item started a discussion about communication with SCI stakeholders. The group identified a need to develop more specific SCI distribution lists. Mike McDaniel will develop and maintain the following 3 distribution lists:

Single Point of Contact [SPOC] – This will be a person designated by stakeholders that will be the Single Point of Contact for general SCI issues or concerns.

SCI Users – This list will get information on meeting notices and other general interest items. This group will be developed as a resource for identifying opportunities for SCI enhancements. The SCI SPOC will be included in this list.

SCI Test Group – This list will be made up of SCI users interested in testing issues.

Mike McDaniel will send out a note to the SCI contacts asking for names of users for inclusion in the above lists.

Family Based Search

There are numerous clients with more than one record on SCI. A family based search [displaying family groups for which that client is known to SCI] would be an additional aid in determining a correctly matched record.

Many customers already have access to MEDS and utilize the MEDS address and family composition information to make help these decisions. If DHS were to add this enhancement, we would still encourage those customers to use MEDS as much as they do now.

There are several issues surrounding this item. The group decided that a separate workgroup would meet to determine the best way to proceed.

Mike McDaniel will set up this meeting.

ACTION ITEMS

1. User Group notes will be sent out to participants
2. Modify SCI to make 'Dual' Search the default.
3. Investigate Return Codes for greater than 25 records returned.
4. Research Alien Number as a selection criteria.
5. Research Mother's Name as selection criteria.
6. Sort addresses by time stamp.
7. Send SCI documentation to SCI Users.
8. Set up meeting to discuss protocol for SCI record combines.
9. Add MEDS SSN verification to SCI.
10. Set up meeting to discuss a Family Based Search for SCI
11. Set up SCI SPOC Distribution list. **Done**
12. Set up SCI testing notification distribution list. **Done**